



# **Kentucky Angel Investment Tax Credit**

## Statutorily Required Annual Reports

FY 2021-2022



Kentucky Enterprise Initiative Act (KEIA) Fiscal Year 2022 Annual Report

Company	Investor	Approval Date	Investment Status	Projected Angel Investment	Actual Angel Investment	Max Potential Credit	Actual Angel Credit
Bexion Pharmaceuticals, Inc.	Zalla, John W.	5/26/22	Investment Made	\$800,000.00	\$800,000.00	\$200,000.00	\$200,000.00
Bexion Pharmaceuticals, Inc.	Forgiel, Mary Zalla	5/26/22	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
Bexion Pharmaceuticals, Inc.	Burch, Leroy	5/26/22	Investment Made	\$200,000.00	\$200,009.39	\$50,000.00	\$50,000.00
borderless LLC	Herrera, Melinda J.	7/29/21	Investment Made	\$80,000.00	\$80,000.00	\$20,000.00	\$20,000.00
CPA Innovations, LLC	Bhatia, Aneeta R.	9/30/21	Investment Made	\$39,861.00	\$39,861.00	\$9,965.00	\$9,965.00
CPA Innovations, LLC	Hornung, William Keith	10/28/21	Investment Made	\$50,000.00	\$50,058.00	\$12,500.00	\$12,500.00
CPA Innovations, LLC	Greenberg, John Ross	10/28/21	Investment Made	\$75,000.00	\$75,087.00	\$18,750.00	\$18,750.00
CPA Innovations, LLC	McClelland, Martin N.	10/28/21	Inactive	\$100,000.00	-	\$25,000.00	\$0.00
Hippo Manager Software, Inc.	Toutant, Roy T.	7/29/21	Investment Made	\$80,000.00	\$80,000.00	\$20,000.00	\$20,000.00
Hippo Manager Software, Inc.	Luftman, Brian Aaron	7/29/21	Investment Made	\$15,000.00	\$15,000.00	\$3,750.00	\$3,750.00
Hippo Manager Software, Inc.	Smith, Stewart A.	7/29/21	Investment Made	\$15,000.00	\$15,000.00	\$3,750.00	\$3,750.00
Hippo Manager Software, Inc.	Hager Jr, W. Lyman	7/29/21	Investment Made	\$45,000.00	\$45,000.00	\$11,250.00	\$11,250.00
Lepidext, Inc.	Toutant, Roy T.	4/28/22	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
Liberate Medical (DE), Inc.	Toutant, Roy T.	12/9/21	Investment Made	\$25,000.00	\$25,000.01	\$6,250.00	\$6,250.00
Liberate Medical (DE), Inc.	La Rocca, Renato V.	12/9/21	Investment Made	\$10,000.00	\$10,000.00	\$2,500.00	\$2,500.00
Liberate Medical (DE), Inc.	McDaniel, John Ryan	12/9/21	Investment Made	\$25,000.00	\$25,000.00	\$6,250.00	\$6,250.00
Liberate Medical (DE), Inc.	Francois, Cedric	12/9/21	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
Liberate Medical (DE), Inc.	Moore, John Marshall	12/9/21	Investment Made	\$25,000.00	\$25,000.00	\$6,250.00	\$6,250.00
MEP Equine Solutions, LLC	Chait, Jonathan F.	8/26/21	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
MEP Equine Solutions, LLC	Jakobi, Larry A.	8/26/21	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
MEP Equine Solutions, LLC	Toutant, Roy T.	12/9/21	Investment Made	\$50,000.00	\$49,997.25	\$12,500.00	\$12,499.00
MEP Equine Solutions, LLC	Schackel, Richard Lee	12/9/21	Investment Made	\$50,000.00	\$25,000.00	\$12,500.00	\$6,250.00
MEP Equine Solutions, LLC	Frey, Robert E.	12/9/21	Investment Made	\$25,000.00	\$24,999.76	\$6,250.00	\$6,249.00
Mindful Beverage Group, Inc.	Warner, Gayla L.	5/26/22	Investment Made	\$12,000.00	\$12,000.00	\$3,000.00	\$3,000.00
Parasight System Inc.	Young, Christopher H.	3/31/22	Investment Made	\$250,000.00	\$249,888.00	\$62,500.00	\$62,472.00
Personal Medicine Plus LLC	Luftman, Brian Aaron	12/9/21	Investment Made	\$10,000.00	\$10,000.00	\$4,000.00	\$4,000.00
Personal Medicine Plus LLC	Followell, Robert A.	12/9/21	Investment Made	\$12,500.00	\$12,500.00	\$5,000.00	\$5,000.00
Predictive Sports Science, LLC	Nicholson, Theodore G.	7/29/21	Investment Made	\$45,000.00	\$45,000.00	\$11,250.00	\$11,250.00
RedLeaf Biologics, Inc.	Stuedle, Joseph A.	10/28/21	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
RedLeaf Biologics, Inc.	Stuedle, Margaret Kristin	10/28/21	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
RedLeaf Biologics, Inc.	Kakoyiannis, Jason Peter	7/29/21	Investment Made	\$50,000.00	\$49,997.00	\$12,500.00	\$12,499.00

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RedLeaf Biologics, Inc.	Olive, Marc-Antoine	8/26/21	Inactive	\$50,000.00	-	\$12,500.00	\$0.00
RedLeaf Biologics, Inc.	Gray, Julia Rebekah Hinson	10/28/21	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
RedLeaf Biologics, Inc.	Boone, Caroline H.	6/30/22	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
RedLeaf Biologics, Inc.	Tucker, Austin Thomas	12/9/21	Investment Made	\$37,500.00	\$37,500.00	\$9,375.00	\$9,375.00
RedLeaf Biologics, Inc.	Tucker, Thomas Thornton	12/9/21	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
RedLeaf Biologics, Inc.	Sizemore, Jacob Matthew	12/9/21	Investment Made	\$37,500.00	\$37,500.00	\$9,375.00	\$9,375.00
RedLeaf Biologics, Inc.	Gray, II, James P.	12/9/21	Investment Made	\$25,000.00	\$25,000.00	\$6,250.00	\$6,250.00
RedLeaf Biologics, Inc.	Saligman, Lynn C.	12/9/21	Investment Made	\$250,000.00	\$250,000.00	\$62,500.00	\$62,500.00
RedLeaf Biologics, Inc.	Woomer, Patti Saligman	12/9/21	Investment Made	\$250,000.00	\$250,000.00	\$62,500.00	\$62,500.00
RedLeaf Biologics, Inc.	Wachtell, Theodore	12/9/21	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
RedLeaf Biologics, Inc.	Wu, Ying	1/27/22	Investment Made	\$12,000.00	\$12,000.00	\$3,000.00	\$3,000.00
RedLeaf Biologics, Inc.	Baum, Mark L	1/27/22	Investment Made	\$15,000.00	\$14,994.99	\$3,750.00	\$3,748.00
RedLeaf Biologics, Inc.	Wong, Kimlee	1/27/22	Investment Made	\$20,000.00	\$20,000.00	\$5,000.00	\$5,000.00
RedLeaf Biologics, Inc.	Fine, Daniel M	1/27/22	Investment Made	\$30,000.00	\$30,000.00	\$7,500.00	\$7,500.00
RedLeaf Biologics, Inc.	Wolk, Robert Ian	1/27/22	Investment Made	\$25,000.00	\$25,000.00	\$6,250.00	\$6,250.00
RedLeaf Biologics, Inc.	Kaya, Urmit	1/27/22	Investment Made	\$20,000.00	\$20,000.00	\$5,000.00	\$5,000.00
Stuff by Text Inc.	Beanblossom, Brent Christian	12/9/21	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
Stuff by Text Inc.	McClelland, Martin N.	12/9/21	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
Synaptak LLC	Toutant, Roy T.	10/28/21	Investment Made	\$25,000.00	\$25,000.00	\$6,250.00	\$6,250.00
Thynk Health, LLC	McClelland, Martin N.	9/30/21	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
Thynk Health, LLC	Hoseus, Michael S.	5/26/22	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
Thynk Health, LLC	Luftman, Brian Aaron	4/28/22	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
Vivorte (DE), Inc.	Stuedle, Joseph A.	5/26/22	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
Vivorte (DE), Inc.	Stuedle, Margaret Kristin	5/26/22	Investment Made	\$100,000.00	\$100,000.00	\$25,000.00	\$25,000.00
Wendal Inc	Kienzle, Barry G.	5/26/22	Investment Made	\$50,600.00	\$50,600.00	\$12,650.00	\$12,650.00
Wendal Inc	Pietromonaco, MaryAnn	6/30/22	Investment Made	\$10,032.00	\$10,032.00	\$2,508.00	\$2,508.00
Wendal Inc	Duncan, Angela M.	6/30/22	Investment Made	\$10,032.00	\$10,032.00	\$2,508.00	\$2,508.00
Wendal Inc	Lanham, Nicholas R.	5/26/22	Investment Made	\$40,040.00	\$40,040.00	\$10,010.00	\$10,010.00
Wendal Inc	Watkins, Matthew David	6/30/22	Investment Made	\$10,032.00	\$10,032.00	\$2,508.00	\$2,508.00
Wendal Inc	Zapp, Robert W.	4/28/22	Investment Made	\$50,000.00	\$50,000.00	\$12,500.00	\$12,500.00
Wendal Inc	Grace, Corey Paul	4/28/22	Investment Made	\$20,020.00	\$20,020.00	\$5,005.00	\$5,005.00
Wendal Inc	Verst, Paul Thomas	4/28/22	Investment Made	\$50,000.00	\$49,984.00	\$12,500.00	\$12,496.00
Wendal Inc	Arrasmith, II, Jerry Joseph	4/28/22	Investment Made	\$30,008.00	\$30,008.00	\$7,502.00	\$7,502.00
Wendal Inc	Schlotman, John Michael	4/28/22	Investment Made	\$50,028.00	\$50,028.00	\$12,507.00	\$12,507.00

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Wendal Inc	Beck, Steven Clay	6/30/22	Investment Made	\$10,032.00	\$10,032.00	\$2,508.00	\$2,508.00
Wendal Inc	Haas, Eric A.	6/30/22	Investment Made	\$22,000.00	\$22,000.00	\$5,500.00	\$5,500.00
Wendal Inc	Bray, Scott R.	6/30/22	Investment Made	\$20,328.00	\$20,328.00	\$5,082.00	\$5,082.00
Wendal Inc	Lonnemann, Jr., John Michael	6/30/22	Investment Made	\$10,032.00	\$10,032.00	\$2,508.00	\$2,508.00
<b>Grand Total</b>				<b>\$4,519,545.00</b>	<b>\$4,344,560.40</b>	<b>\$1,133,261.00</b>	<b>\$1,089,474.00</b>